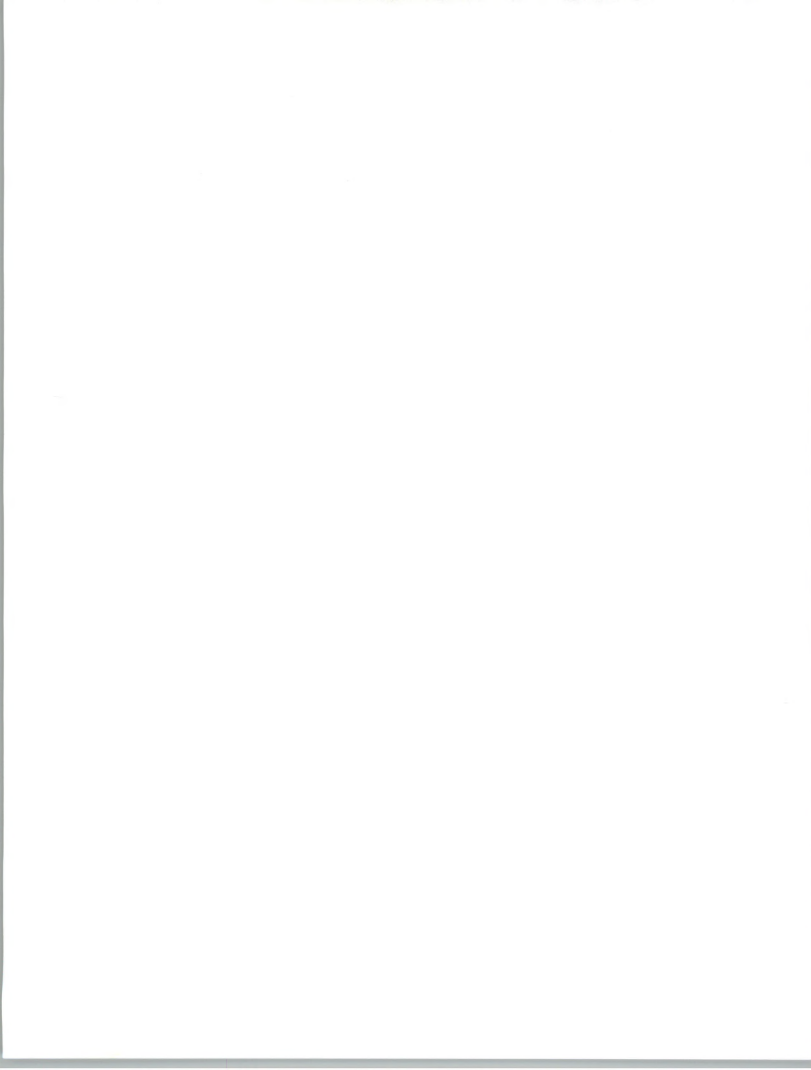


U.S. Information Services Market Forecast and Analysis, 1993-1998

Robert Goodwin
Manager
Information Services
Market Analysis Program
INPUT



1993: The Worst of Times

- Slow recovery from global recession
- Intense competition
- Demise of proprietary systems
- Mainframe and mini shipment decline
- Systems software's lower growth

INPUT

MC3-BG-2a

Notes



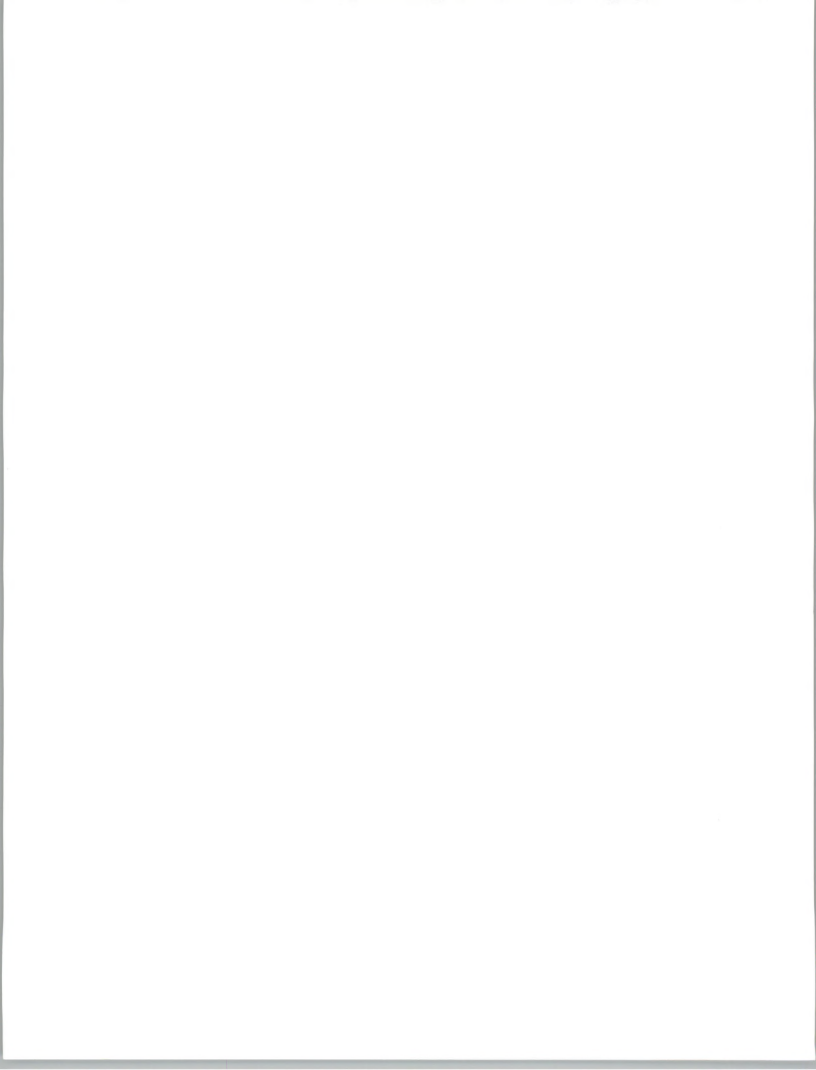
1993: The Worst of Times

- Profit squeeze
- Client/server paradigm creates risks
- Complex user-driven solutions
- Longer selling cycles
- Maturation of major markets
- 12% CAGR, 1993-1998

INPUT

MC3-BG-2b

Notes



1993: The Best of Times

- Recovery from recession (slow)
- Globalization of IS
- Client/server creates opportunities
- Open systems standards and acceptance
- Customizable software products

INPUT

MC3-BG-3a

Notes

The first part of the paper discusses the importance of understanding the cultural context of the research. It highlights the need for researchers to be sensitive to the values and beliefs of the communities they are studying. This is particularly important in the field of education, where cultural differences can significantly impact learning outcomes. The paper then moves on to discuss the challenges of conducting research in diverse cultural settings. It notes that researchers often face difficulties in establishing rapport with participants and in interpreting their responses. To address these challenges, the paper suggests several strategies, including the use of local researchers and the development of culturally appropriate research instruments. The final part of the paper discusses the importance of ethical considerations in cross-cultural research. It emphasizes the need for researchers to obtain informed consent from participants and to ensure that their research does not cause harm or exploitation. The paper concludes by noting that while cross-cultural research is a complex and challenging endeavor, it is also a highly rewarding one that can lead to a deeper understanding of human behavior and culture.

1993: The Best of Times

- Business process change
- Multimedia
- Information super-highway
- PC/Workstation software products growth
- 12% CAGR, 1993-1998, \$285 billion in aggregated new revenues

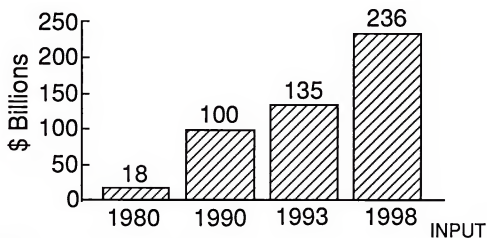
INPUT

MC3-BG-3b

Notes



U.S. Information Services Industry 1970-1998

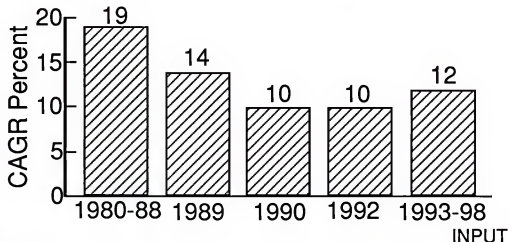


MC3-BG-4

Notes



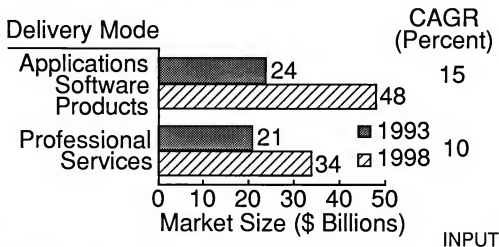
U.S. Information Services Industry: Annual Growth Rates



MC3-BG-5

Notes

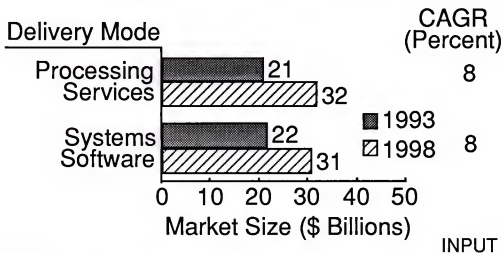
U.S. Information Services Industry



MC3-BG-6a

Notes

U.S. Information Services Industry

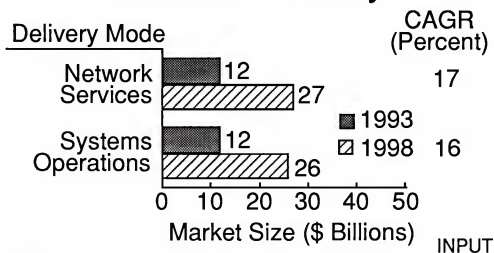


MC3-BG-6b

Notes



U.S. Information Services Industry



MC3-BG-6c

Notes

Table 1. Mean (SD) age, height, weight, and body mass index (BMI) of the 100 children in the study

Measure	Mean (SD)
Age (years)	10.2 (0.5)
Height (cm)	145.2 (10.1)
Weight (kg)	38.5 (10.2)
BMI (kg m ⁻²)	18.6 (3.2)

children were asked to perform a series of 10 trials of the task. The first trial was a practice trial and the remaining 9 trials were recorded. The mean of the last 9 trials was used for analysis.

Children were then asked to perform the task again, but this time they were asked to perform the task as fast as they could. The mean of the last 9 trials was used for analysis.

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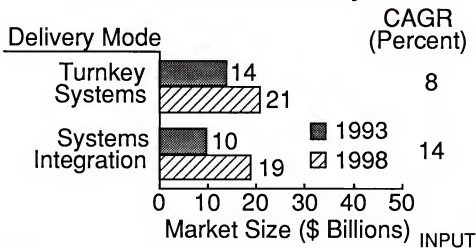
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U.S. Information Services Industry



MC3-BG-6d

Notes

the 1990s, the number of people in the world who are under 15 years of age is expected to increase from 1.1 billion to 1.5 billion.

As the world's population grows, the demand for food and other resources will increase. This will put pressure on the environment and on the world's food supply.

One way to meet this demand is to increase the amount of food that is produced. This can be done by using more land for agriculture, or by using more efficient farming methods.

Another way to meet this demand is to reduce the amount of food that is wasted. This can be done by improving the way that food is stored and distributed.

There are many other ways to meet this demand, and it is important that we find ways to do so in a sustainable way.

One of the most important things we can do is to protect the environment. This means taking steps to reduce pollution and to conserve natural resources.

Another important thing we can do is to improve the way that we use resources. This means finding ways to use less energy and to recycle more materials.

There are many other things we can do to meet the world's growing demand for food and other resources. It is important that we all do our part to make sure that we have enough to eat and that the environment is protected.

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Equipment Forecast Scenarios, 1993-98

- PC/Workstation
 - Unit growth rate 25%
 - Annual price erosion 20%
 - Revenue growth 5%

INPUT

MC3-BG-7a

Notes

Equipment Forecast Scenarios, 1993-98

- Minicomputers
 - Unit growth rate 6%
 - Annual price erosion 8%
 - Revenue growth -2%

INPUT

MC3-BG-7b

Notes

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Equipment Forecast Scenarios, 1993-98

- Mainframes

- Unit growth rate -3%
- Annual price erosion 8%
- Revenue growth -11%

INPUT

MC3-BG-7c

Notes

Systems Software Products Major Forecast Changes

	Market CAGR (%)	
	1992-97	1993-98
Mainframe	10	1
Mini	11	4
PC/Workstation	22	19
Total Market	14	8

INPUT

MC3-BG-8

Notes

the 1990s, the number of people with a diagnosis of schizophrenia has increased in the United Kingdom (Meltzer 1997). The prevalence of schizophrenia in the United Kingdom is estimated to be 1.2% (Meltzer 1997). The prevalence of schizophrenia in the United States is estimated to be 1.1% (Meltzer 1997).

There is a growing awareness of the need to improve the lives of people with schizophrenia. The World Health Organization (WHO) has developed a set of guidelines for the management of schizophrenia (WHO 1993). The guidelines recommend that people with schizophrenia should be treated with a combination of medication and psychosocial interventions. The guidelines also recommend that people with schizophrenia should be treated in a community setting rather than in a hospital.

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Systems Software Product Forecasts

	1992-97 CAGR (%)	1993-98 CAGR (%)
Systems control products	10	1
Operations mgmt. tools	11	7
Application development tools	13	12

INPUT

MC3-BG-9

Notes

The first part of the paper discusses the importance of understanding the cultural context of the research. It highlights the need for researchers to be sensitive to the values and beliefs of the communities they are studying. This is particularly important in the field of health research, where cultural differences can significantly impact the effectiveness of interventions.

The second part of the paper presents a review of the literature on cultural competence in health care. It examines the various models and frameworks that have been developed to guide the development of culturally competent health care providers. The review also identifies the challenges and barriers to achieving cultural competence in practice.

The third part of the paper describes the methodology used in the study. It details the selection of participants, the data collection methods, and the analysis techniques. The study was conducted in a community-based setting, and the participants were recruited through a variety of channels, including local health centers and community organizations.

The fourth part of the paper presents the results of the study. It discusses the findings related to the cultural beliefs and practices of the study population, as well as the barriers to accessing health care services. The results also highlight the need for culturally tailored interventions that take into account the specific needs and preferences of the community.

The final part of the paper discusses the implications of the findings for practice and policy. It suggests ways in which the results can be used to inform the development of culturally competent health care programs and services. The paper also identifies areas for further research and suggests potential future studies.

Systems Software Products: Reduced Growth Rates

- Possible “implosion”
- Rapid decline in mainframe equipment shipments
- PC equipment: saturated market?

INPUT

MC3-BG-10a

Notes

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Systems Software Products: Reduced Growth Rates

- Downward pricing pressures
 - Mainframe software price reductions
 - PC software price wars
 - User expectations
- Software products becoming commodities

INPUT

MC3-BG-10b

Notes

Systems Software Products: Reduced Growth Rates

- Phase-out of tiered pricing
- Enterprise software licensing trends
 - Long-term
 - User-based
 - Fixed price maintenance

INPUT

MC3-BG-10c

Notes

Software Product Pricing

- Downward pull in rough proportion to equipment price decline, but with lower amplitude
 - Software is value-added component
 - Client/server pricing can minimize erosion
- Pricing flexibility in Middleware

INPUT

MC3-BG-11

Notes

the 1990s, the number of people with a diagnosis of schizophrenia has increased in the United Kingdom (Meltzer 1998). The prevalence of schizophrenia in the United Kingdom is estimated to be 1.2% (Meltzer 1998). The prevalence of schizophrenia in the United States is estimated to be 1.1% (Meltzer 1998).

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Software Market Positioning Issues

- Major battle: Windows NT and NetWare/UNIX for server markets
- Standardization of UNIX operating system
- Control of operating system market brings control of application solutions

INPUT

MC3-BG-12

Notes

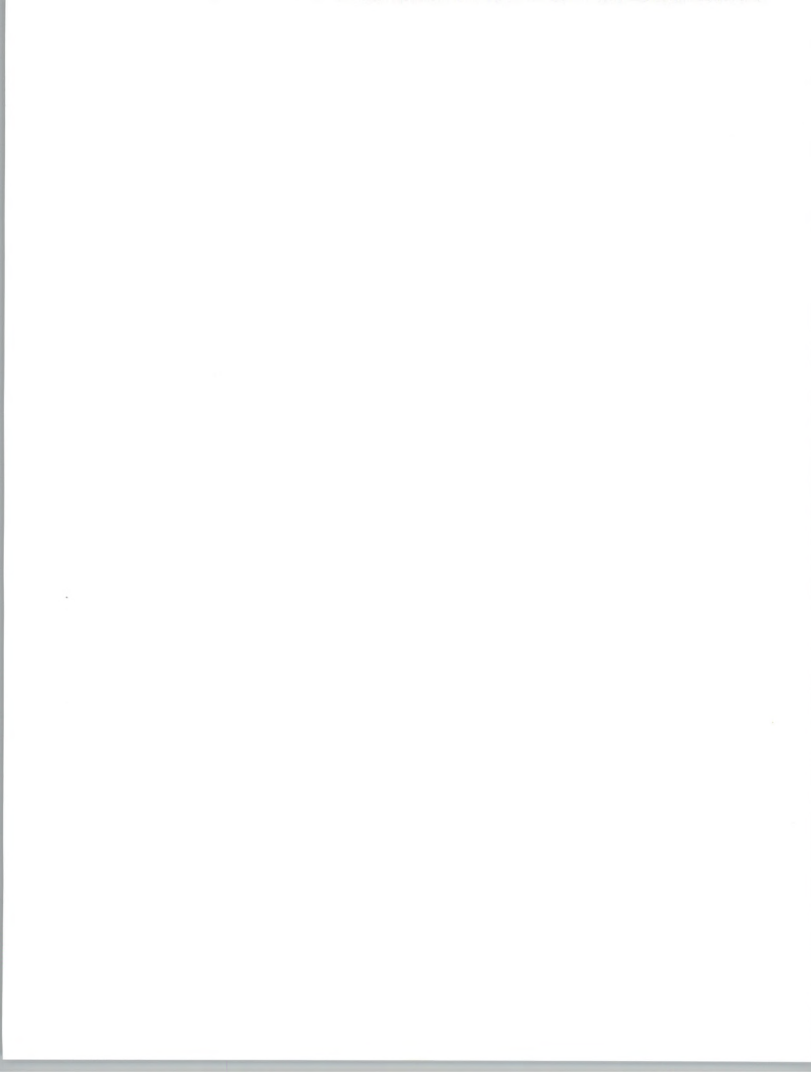
Professional Services Markets

Platform	1992 Revenues (%)	1998 Revenues (%)
Mainframe	52	15
Workstation/PC	25	60
Midrange	21	15
Standalone open systems	2	10
Total	100	100

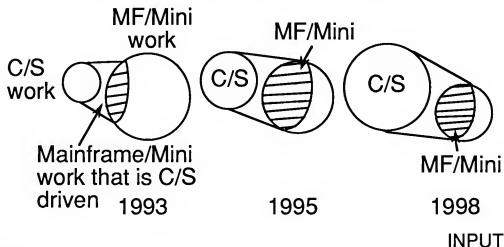
INPUT

MC3-BG-13

Notes



Client/Server Influence on Professional Services Work



Notes

Business Process Change Leverage on Information Services

BPC drives new information services

- Restructuring organizations
- Quality programs
- Cost reduction/value
- C/S architecture
- Imaging

INPUT

MC3-BG-15

Notes



Rising Cost of Sales: Drain on Vendor Profits

- Complex solutions require longer selling cycle
- Recessionary thinking causes buyer caution, slower decisions
- More frequent ROI analysis causes delays

INPUT

MC3-BG-16a

Notes



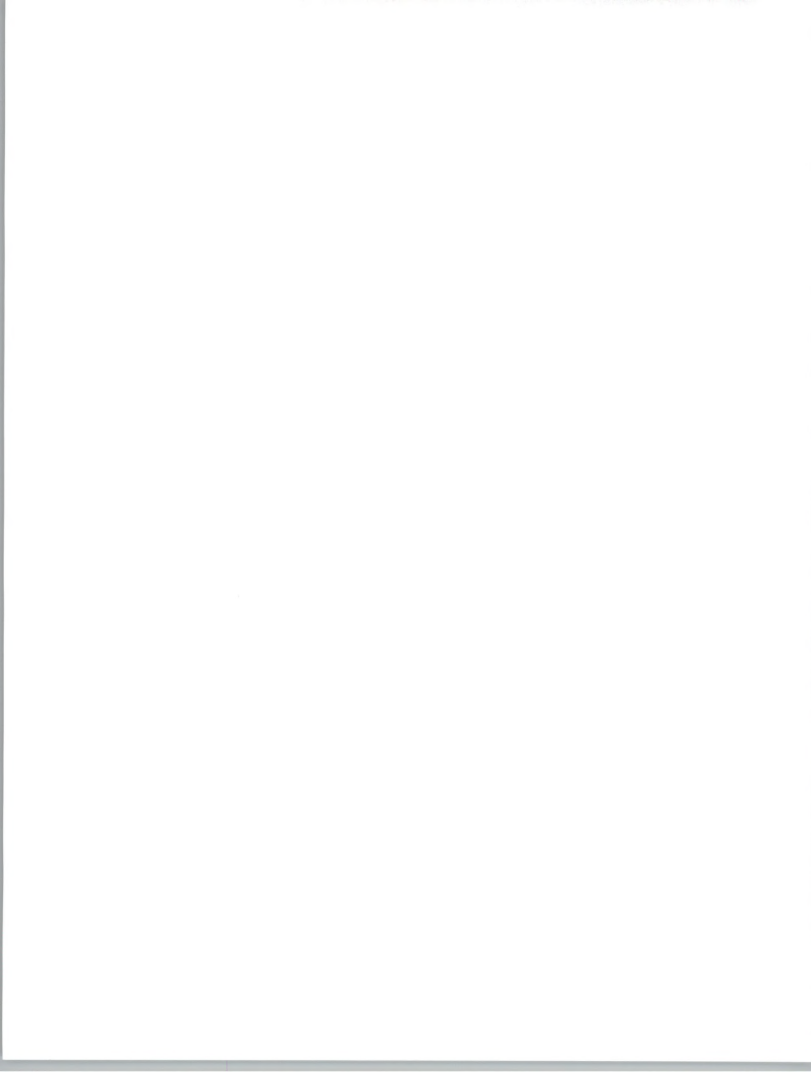
Rising Cost of Sales: Drain on Vendor Profits

- Multi-dept. user involvement complicates decision
- New training needed for sales forces:
 - Technical competence
 - Complex selling/buying cycle

INPUT

MC3-BG-16b

Notes



Conclusions

The best of times *IS* here,
for vendors who can:

- Deliver client/server solutions
- Achieve global presence
- Deliver open systems solutions
- Sell/consult at strategic levels

INPUT

MC3-BG-17a

Notes



Conclusions

The best of times *IS* here,
for vendors who can:

- Provide software solutions on multiple operating systems
- Form alliances to expand client/server product scope, skill sets, market coverage

INPUT

MC3-BG-17b

Notes

the 1990s, the number of people in the world who are under 15 years of age is expected to increase from 1.1 billion to 1.5 billion.

As the world's population grows, the demand for food and other resources will increase. This will put pressure on the environment and on the world's food supply.

One way to meet this demand is to increase the amount of food that is produced. This can be done by using more land for agriculture, by using more water, or by using more fertilizers.

Another way to meet this demand is to increase the efficiency of food production. This can be done by using better farming techniques, by using better seeds, or by using better fertilizers.

There are many ways to meet the world's growing demand for food and other resources. It is up to us to decide which way is best.

One of the most important things we can do is to make sure that we are using resources wisely. This means using less water, using less land, and using less fertilizer.

Another important thing we can do is to make sure that we are using the best farming techniques. This means using the best seeds, the best fertilizers, and the best farming methods.

Finally, we can make sure that we are using the best food. This means eating less meat, eating more fruits and vegetables, and eating less processed food.

By doing these things, we can help to meet the world's growing demand for food and other resources. This will help to make sure that everyone has enough to eat.

There are many other things we can do to help the world. We can recycle, we can conserve energy, and we can protect the environment.

By doing these things, we can help to make the world a better place for everyone. This is our responsibility.

Let's all do our part to make the world a better place. We can make a difference.

Thank you for reading this article. I hope it has helped you to understand the world's growing demand for food and other resources.

There are many other things we can do to help the world. We can recycle, we can conserve energy, and we can protect the environment.

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Let's all do our part to make the world a better place. We can make a difference.

Thank you for reading this article. I hope it has helped you to understand the world's growing demand for food and other resources.

Conclusions

The best of times *IS* here,
for vendors who can:

- Build alternate delivery channels
- Provide customizable products
- Offer a continuum of services

INPUT

MC3-BG-17c

Notes

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Conclusions

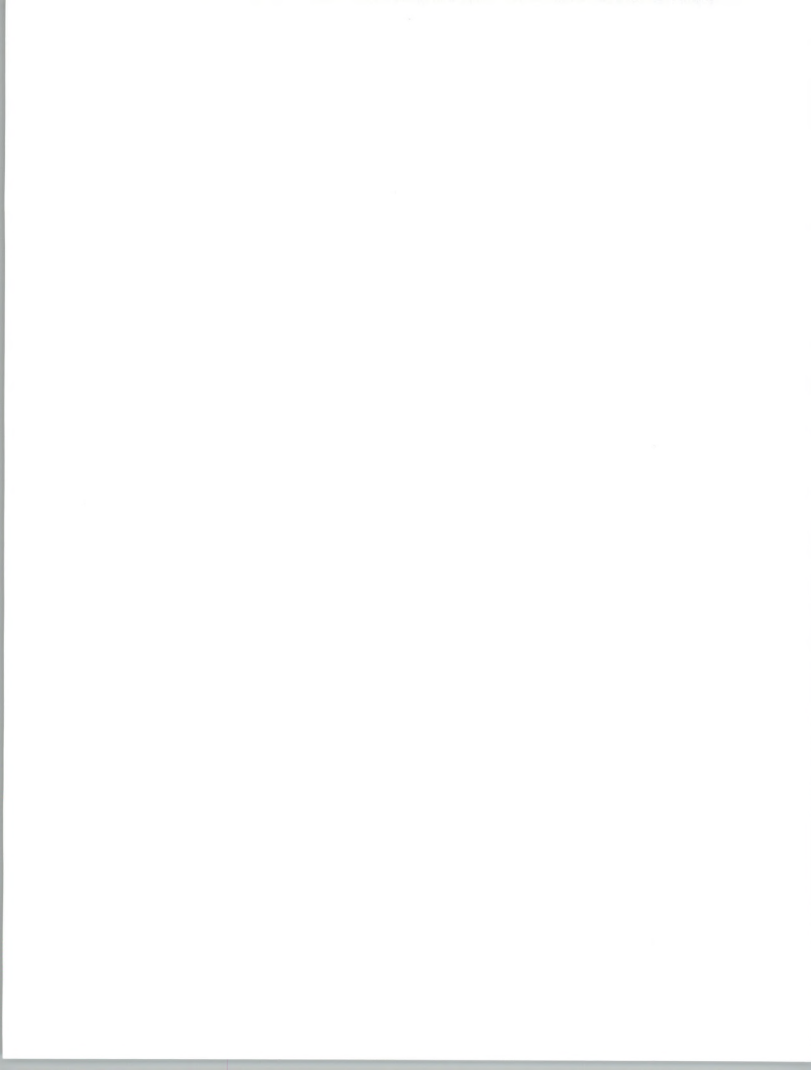
The best of times *IS* here,
for vendors who can:

- Invest in sales training
 - Sales staff
 - Support staff

INPUT

MC3-BG-17d

Notes



Conclusions

The best of times *IS* here,
for vendors who can:

- Leverage their expertise
 - Vertical market
 - Technology/establish technology centers

INPUT

MC3-BG-17e

Notes

ROBERT L. GOODWIN
MANAGER, INFORMATION SERVICES
MARKET ANALYSIS PROGRAM

PROFILE

CAPABILITIES

- Twenty-five years of successful sales, marketing, and general management in the computer equipment, remote processing services, and software industries.
- Expertise in business plan development, strategic partnering and acquisitions, industry marketing, VAR and reseller operations.

BACKGROUND

- Robert (Bob) Goodwin brings to INPUT and its clients comprehensive experience in executive management in large and mid-size corporations.
- Most recently, Senior Vice President—Marketing, Hotel Information Systems, leading vendor of global information systems to the hospitality industry.
- He has served as President of Command Data Systems, a public safety software and turnkey systems vendor. With Bob's leadership and marketing strategy, CDS became a highly visible and respected vertical market leader.
- Bob's qualifications include the role of Director of Marketing for Xerox Computer Services, in support of all field sales and customer services activities.
- At IBM, Bob served as Branch Manager and Assistant District Manager.
- Chairman, Electronic Forms Transfer Committee, ITAA

EDUCATION

- B.A., Psychology, Occidental College.
- Attended the MBA program, Golden Gate University.

